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Research News for the U.S. Travel Industry

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TRAVEL PRINTOUT

US Travel Data Center

April 1990 Volume 19, Number 4

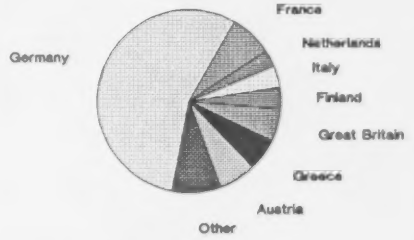
Agreement Links American, European Travel

Europeans made nearly 200 million trips abroad (outside their home countries) in 1989. For the first time USTDC has this type of European travel data available, serving as the exclusive marketing representative in North America for the European Travel Data Center.

"U.S. companies are forging closer ties with the European community with the new environment in Europe," said Dr. Suzanne Cook, executive director of USTDC. "It was important for us to expand services internationally in order to help meet the growing challenges of the 1990s and to better serve the U.S. travel industry."

The agreement provides that the U.S. Travel Data Center and the European Travel Data Center will be the exclusive representative on their respective continent of each other's products, primarily in depth research surveys. Both data centers are working towards standardizing U.S. and European travel research to help create a uniform world travel model.

TRIPS TO EASTERN EUROPE (1+ NIGHTS) BY COUNTRY OF ORIGIN



Source: European Travel Data Center, 1990

The European Travel Data Center is the foremost source of information regarding the European travel market. ETDC, based in Luxembourg, compiles information on the inbound and outbound travel markets of Western European countries.

Results cover travel by residents from 18 different countries: Austria, Belgium, Denmark, Finland, France, West Germany, Great Britain, Greece, Iceland, Ireland, Italy, Luxembourg, Netherlands, Norway, Portugal, Spain, Sweden, and Switzerland to 34 destination countries including the U.S. and Canada. In 1990 information will be collected from five Eastern European countries; East Germany, Poland, Hungary, Czechoslovakia and Yugoslavia.

ETDC produces the European Travel Monitor, which collects detailed information on both inbound and outbound travel markets. Nearly 35,000 Europeans are interviewed six times a year to determine their travel during the previous two months. A total of 200,000 are interviewed every year to provide highly reliable measures of travel volume, market share, characteristics and trends.

The European Travel Monitor is broken down into outbound and inbound reports. The outbound report measures the number of domestic trips of one night or more by residents of each of the 18 Western European countries, as well as trips outside their countries.

Trip data collected include; purpose of trip, mode of transportation, travel arrangements, season of trip, length of stay within each destination country, aggregate expenditures and a series of traveler demographics.

The inbound report is arranged on an individual country basis, covering all trips made by residents from the 18 Western European countries.

There are future plans to develop additional information, such as special reports containing more detailed information on Europeans' use, awareness and preferences of specific "brands" covering airlines, accommodations, credit cards and rental cars.

U.S. corporations will be able to purchase a complete outbound package and/or a complete series of inbound reports. An organization can also purchase inbound and outbound travel information on specific countries and/or market segment.

The agreement also offers the opportunity to customize research, add additional questions to develop proprietary information and purchase tapes containing the data base. In addition, corporations can receive a price reduction by combining with other corporations in their industry segment.

For additional information on the agreement between USTDC and the European Travel Data Center contact Bob McClure at (202) 293-1040.

Higher Lodging, Airline Fares Increase Cost of February Travel

The overall cost of travel in the U.S. rose 1.5 percent in February due largely to the increased rates of lodging and airline fares, according to the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. grew to 130.9 (1982 - 84 = 100) during February.

For comparison, the overall cost of goods and services Americans purchased as measured by the Consumer Price Index (CPI) rose 0.5 percent to 128.0.

Travel Price Index and Components

February 1990 TPI Component	Monthly % Change January 1990 to February 1990	Annual % Change February 1989 to February 1990
Transportation	0.5	10.5
Airline Fares	2.5	7.6
Other Intercity Trans	0.1	1.8
Intracity Public Trans	1.1	6.7
Motor Fuel	-0.9	12.8
Lodging	4.4	10.0
Food and Beverages Away From Home	0.1	4.2
Entertainment	0.0	7.1
TRAVEL PRICE INDEX	1.5	7.2
CONSUMER PRICE INDEX	0.5	5.3

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

Lodging rates showed the highest increase in February jumping 4.4 percent. Overall transportation costs rose only 0.5 percent. Airline fares showed the highest increase in transportation, rising 2.5 percent. The only decrease in February travel costs occurred in motor fuel, which dropped -0.9 percent. Food and beverages showed a slight rise at 0.1 percent, while entertainment costs showed no change in February.

Over the past 12 month period, the TPI rose 7.2 percent, influenced by a 10.0 percent jump in lodging and a 7.6 percent increase in airline fares. Even though motor fuel showed the only decrease in February it still showed the highest increase over the last 12 months at 12.8 percent.

January Travel Increases

There were 84.3 million total person-trips taken by U.S. residents in January, a 6 percent increase over January 1989, according to the Data Center's latest National Travel Survey (NTS) results. (A person-trip measures each person traveling 100 miles or more away from home.)

The largest increase occurred in business travel, which totaled 16 million person-trips, an increase of 28 percent over January 1989. Although business travel grew substantially, business trips were shorter, averaging 3.6 nights this year compared to 3.8 nights last year.

In addition, business trips also involved longer distances with the average round-trip distance jumping from 990 miles in January 1989 to 1190 miles in January 1990.

The overall growth in pleasure travel remained moderate with a 2 percent increase. Vacation person-trips, a sub-group of pleasure travel, jumped nearly 15 percent in January 1990, reflecting in part a small increase in the average travel party size.

The average duration of a trip increased to 4.4 nights in January 1990, compared to 4.1 nights in the previous year. Pleasure travel showed the largest increase, jumping from 4.4 nights to 4.7 nights.

Travel to the Northeast region increased dramatically, compared to January 1989 figures. The increase is probably related to the unusually warm weather experienced in January. The Southeast experienced moderate growth, and the Great Lakes region remained at 10.3 million person-trips, with no change from the previous January. Travel to the Midwest was off substantially but the West experienced a significant growth of visitors.

Air travel became a more popular choice for transportation in January, jumping nearly 6 percent in person-trips, while auto travel rose slightly to more than 2 percent.

The National Travel Survey is conducted monthly by telephone with national probability samples of 1,500 adults (age 18+) representing the total adult civilian, non-institutional population of the United States.

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Scott M. Dring, Editor

TRAVEL PRINTOUT reports on Data Center projects, national travel research conducted by other organizations and trends in the U.S. Travel Industry. Subscriptions are $75 per year; Foreign countries, $80 per year, payable in U.S. funds. ISSN: 0744-6233.

TEIM to be Released in July

The Data Center has announced that the Travel Economic Impact Model (TEIM) will be completed and released at a press conference on July 13 in Washington.

The Data Center is currently in the final stages of completing the forecasting component, according to Dr. William Fleming, economic research manager at the Data Center. The forecasting model has the capability to make projections about the economic impact of travel for the country, states and metropolitan areas.

Undergoing expansion and improvement, the Data Center's Travel Economic Impact Model (TEIM) is a statistical model that provides annual estimates of travel-generated spending and its impact on national, state and local economies.

Following revision, the model will be a more effective and flexible tool for assessing the impact travel has on the economy.

For more information about the Travel Economic Impact Model (TEIM) and its capabilities, contact Dr. William Fleming, manager of economic research, at (202) 293-1040.

Discoveries needed...

Do you have a travel research project that deserves a little recognition? **Travel Printout** is the place in the monthly "Discoveries" section.

"Discoveries" is a **Travel Printout** feature designed to give added exposure to all types of travel-related research.

To submit your company's travel research projects, send a brief description of the report, including the price, address, and contact name, to **Travel Printout**, U.S. Travel Data Center, 1133 21st Street, Washington, D.C., 20036.

Visitor Volume at National Parks

Region	JAN 1990 visits	% Change from JAN 1989	Year to Date % Change 1990/89*
NEW ENGLAND	282,073	-6.3%	-6.3%
MIDDLE ATLANTIC	1,001,902	20.4	20.4
SOUTH ATLANTIC	3,105,468	-24.7	-24.7
EAST SOUTH CENT.	1,332,694	6.5	6.5
EAST NORTH CENT.	188,124	-2.3	-2.3
WEST NORTH CENT.	176,006	-1.3	-1.3
WEST SOUTH CENT.	450,534	2.2	2.2
MOUNTAIN	1,255,119	7.5	7.5
PACIFIC	3,142,725	16.7	16.7
TOTAL	10,934,645	-2.2	-2.2

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Census regions: **New England:** Conn., Maine, Mass., N.H., R.I., Vermont. **Middle Atlantic:** N.J., N.Y., Penn. **S. Atlantic:** Del., District of Columbia, Fla., Ga., Md., N. C., S.C., Va., W. Va. **East South Central:** Ala., Ky., Miss., Tenn. **East North Central:** Ill., Ind., Mich., Ohio, Wis. **West North Central:** Iowa, Kan., Minn., Mo., Neb., N.D., S.D. **West South Central:** Ark., La., Okla., Texas. **Mountain:** Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo. **Pacific:** Alaska, Calif., Hawaii, Ore., Wash.

News at the Data Center

The USTDC Membership Committee met on April 19 in Washington to discuss better ways of serving the Data Center's membership. Among the topics discussed were dues and membership benefit packages, according to staff liaison Lori Litzenberg.

Preliminary recommendations, along with redefined membership categories, discussed at the meeting leaned towards providing additional services and benefits to members.

The committee is in the process of compiling recommendations, which will be presented at the Board of Trustees Meeting on June 3 at Pow Wow in Orlando.

Members attending the meeting on April 19 were; Robert Liming, chairman; Robert Bryan, Peter Mason, Bob McClure, Jim Prosser, David Swierenga and Warren Wiethaupt.

AAA Joins Summer Forecast Press Conference

For the first time The American Automobile Association (AAA) will join USTDC for the annual Summer Vacation Travel Forecast press conference on May 22 in Washington.

The press conference will include the Data Center's annual summer forecast and AAA's Memorial Weekend projections. The joint press conference was created to provide a more concise and in depth summer forecast for the public and media.

This is the USTDC's ninth annual Summer Forecast. It annually releases projections on the number of summer vacation travelers, modes of transportation, accommodations, regional destinations, duration of travel and other summer forecasting material.

Current Travel Indicators - 1989-90

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	Jan	$ 4,592	million	26.0	8.0	8.0
Eating and Drinking Places(2)	Jan	$14,005	million	2.1	1.7	1.7
Gasoline Service Stations(2)	Jan	$ 9,482	million	-0.6	11.9	11.9
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	Jan	63.5	percent	-2.2	3.9	3.9
Real Demand for Commercial Lodging(4)	Jan	49.8	million	5.3	5.9	5.9
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	Jan	24.5	billion	-5.2	1.9	1.9
Int'l Revenue Passenger-Miles	Jan	8.5	billion	5.2	18.2	18.2
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	Jan	38.3	billion	-3.4	3.5	3.5
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	Jan	428.0	million	-12.8	-3.5	-3.5
Travel Price Index (1982 - 84 = 100) (8)	Jan	129.0		2.5	7.0	7.0
U.S. Resident Travel						
Total Person-trips(9)	Jan	84.3	million	-22.3	6.0	6.0
Vacation Person-trips(9)	Jan	59.5	million	-23.8	14.6	14.6
Total Person-nights(10)	Jan	370.9	million	-20.1	n/a	n/a
Vacation Person-nights(10)	Jan	285.6	million	-26.8	n/a	n/a
Public Use of National Parks (11)						
Visits	Jan	10,934,645		13.2	-2.2	-2.2
Overnight Stays	Jan	381,683		-2.9	2.2	2.2
Foreign Arrivals to the U.S.						
From Overseas(12)	Dec	1,159,300		20.3	26.2	12.1
From Canada(13)	Jan	1,073,800		19.4	20.0	20.0
From Mexico(12)	Dec	131,200		50.8	15.3	17.6
U.S. Citizen Departures						
To Overseas(12)	Oct	1,120,600		-9.3	-6.3	1.8
To Canada(13)	Jan	407,573		-25.0	2.6	2.6
Domestic Demand for Gasoline						
Barrels/Day(14)	Jan	6,732	thousands	-7.8	0.0	0.0

(1) Source: Smith Travel Research, seasonally adjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary; revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary; Source: U.S. Department of Energy.

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